Overview of Vendor-supplied Records in the Montana Shared Catalog

Within the MSC there are three main sources of vendor-supplied records. Throughout the time that vendor-supplied records have been added there has been varying oversight from MSC Admin. The addition of a position that focuses on cataloging processes and bibliographic records ensures ongoing oversight of this crucial aspect of the MSC.

At present time, the records of the first two types have been vetted and found to be of sufficient quality to be permanent bibliographic records in the MSC. Those of the third type are routinely scrutinized and libraries using them must work with MSC Admin before importing any new records. The official standard for vendor-supplied records for the MSC is currently being re-evaluated by the Content Management Committee. For the purposes of this document "records that do not meet MSC standards for vendor-supplied records" can be understood to mean those records that do not contain appropriate or adequate control numbers in the 001, 010, 020 and 035 tags, records for digital content that are improperly adapted from print records, records that do not adhere to the minimum standards for copy cataloging as described in the MSC Standard Cataloging Procedures Section 2. Additionally, though there are pre-existing vendor-supplied records that are not up to MSC standards, these records are no longer being added to the MSC and efforts are underway to include these records in future catalog clean-ups.

Sources of vendor-supplied records in the MSC:

1. OCLC records for MontanaLibrary 2Go titles through the State Library's OverDrive contract

There are no issues with the quality of these records, as they come from OCLC, and the procedure for adding them to the MSC is very streamlined. Other issues related to these records will be discussed in section 3.

2. Brief order records and MARC records imported using EDI protocols

As per individual MSC libraries' contracts with the vendors Ingram, Baker & Taylor and Midwest Tapes, libraries receive brief order records from the vendor through the EDI protocol. The brief bib records are loaded before the publication date of items, are equivalent to Cataloging In Process (CIP) records, and their purpose is to track orders and to provide on-order items for patrons to place on hold. Records do not contain OCLC control numbers but do use the ISBN-13. Other MSC libraries are able to add their on-order holdings to these order records in advance on the publication date. The order record is then updated with a permanent MARC record. Permanent records fully adhere to MSC cataloging standards.

In general issues associated with these records are related to whether other libraries, not using EDI, import records between the load of an order record and its permanent MARC record. Because the order record only has one match point – the ISBN-13 – if another record is imported that lacks the 020 tag or only has an ISBN-10 then records will not match when they should, creating duplicate records. Once the permanent record is loaded and overlays the order record, this often results in two nearly identical

records that split MSC holdings between then. This can be corrected if members search by title before loading records and also by catalog clean-up.

3. Vendor-supplied records imported using bib load reports. These records fall into three categories:

   1. Records from MARCIVE, Baker & Taylor, Ingram or Midwest tape that adhere to all MSC standards for bibliographic records but are not loaded using EDI protocols. These are equivalent to the permanent MARC records supplied by vendors mentioned above.
   2. Records for Overdrive titles for those libraries engaged in individual contracts with OverDrive and not in the MTLib2Go consortium. These non-MTLib2Go libraries have the same agreement with OverDrive and OCLC that the MTLib2Go consortium has. They each pay $1.50 per bib for OCLC to insert the 856 tag containing the link to the OverDrive content. If these records match existing MTLib2Go titles in the MSC, they are currently configured to not overlay the existing bib. Additional 856 tags with access information for the non-MTLib2Go libraries are added to the existing bib record manually by MSC staff.

      Issues with these records:

      - At present time there are not many non-MTLib2Go libraries in the MSC purchasing OverDrive content or requesting that bibliographic records for that content be loaded into the MSC. Because these loads are small and there is not a great deal of overlap in holdings, staff time is minimal to preserve the original MTLib2Go bib record. If, however, many more libraries enter into individual agreements with Overdrive it will increase staff time and the bibs themselves will have multiple 856 tags, which is potentially confusing to users.
      - Because the MTLib2Go bibs are nearly identical to the individually provided bibs it is possible to allow the bib records to overlay. All 856 tags are preserved in this process so that discovery is available for all users who are licensed to use content, record quality is not sacrificed, but staff time used to manually add 856 tags is eliminated.
      - Most importantly, it behooves both those members of the MTLib2Go consortium and those libraries with individual OverDrive contracts to continue to investigate ways of decreasing cost. Should more libraries enter into individual contracts with OverDrive it is feasible that the cost incurred for one bib record could end up being quite high, with multiple libraries and/or the MTLib2Go consortium each paying $1.50 for bibs that the MSC may already contain.

   3. Records from other vendors, mostly Follett, for physical holdings and downloadable content. These records are either purchased or provided with orders from Follett and are primarily being loaded for school libraries by MSC Admin. The quality of most of the Follett records is not up to MSC standards and varies widely.

Issues with these records:

- Because the records are created by the vendor they may be based on OCLC records but generally are not up to MSC standard. These records are currently configured to not overlay existing bib in the MSC, but if there is not already a record in the MSC or insufficient match points for the title then these records will load on their own. This has happened frequently and is not acceptable. At present time, MSC Admin has been locating a quality bib record in WorldCat, importing it through SmartPort and then adding the items to this bib.
- Should other libraries decide that they want to load vendor-supplied records of this low quality, then MSC Admin time devoted to supervising these records and loads will increase.
- In the case of the downloadable content, the records are unskillfully adapted from print titles. They often use print ISBNs and may match existing bibs for the print titles, causing items to be improperly matched on load.
- Through the Statewide Group Services contract with OCLC, libraries are eligible to participate in WorldCat Cataloging Partners, a service that matches vendor supplied records with existing WorldCat records and delivers them directly to the library. Most major vendors, including Follett, are part of WorldCat Cataloging Partners. MSC Admin has begun working with one member library to acquire quality bib records through this service. By using WorldCat Cataloging partners the MSC may be able to ensure quality records from vendors with minimal costs incurred.